Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Division
www.ams.usda.gov/GTR

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WEEKLY HIGHLIGHTS

Senate Bill Would Exempt Farm Trucks from Interstate Commercial Motor Vehicle Regulation

Senators Inhofe (R-OK), Merkley (D-OR), and Coburn (R-OK) reintroduced S. 639 on March 19 to allow States to exempt farm trucks with a gross vehicle weight up to 26,000 pounds from the burden of interstate commercial motor vehicle regulation, without the loss of Federal grant funds. Thirty-two States define a commercial motor vehicle as weighing 26,001 pounds or more, compared to the Federal definition of 10,001 pounds or more. A half-ton farm pickup truck with a livestock trailer that crosses a State line is subject to the same interstate regulations as a year-round long-haul commercial tractor-trailer weighing up to 80,000 pounds. This burden affects farmers and ranchers located near the borders of adjoining States, where the closest market for their products and livestock or source of their farm supplies is over the State line. On February 26, Representatives Boren (D-OK) and Fallin (R-OK) reintroduced H.R. 1220, which exempts intrastate farm trucks from several regulations and raises the threshold for regulation to 26,001 pounds.

Legislation Governing Railroad Regulatory Environment Under Consideration

On March 5, the Senate Judiciary Committee passed the Railroad Antitrust Enforcement Act of 2009 by a vote of 14-0. Similar legislation is also being considered by the House. The bill seeks to allow the Justice Department and the Federal Trade Commission to stop future railroad mergers if they believe the mergers violate the antitrust laws, even if the Surface Transportation Board has approved it. If enacted, the bill would also allow State attorneys general and private parties to sue for damages and obtain court orders to halt anti-competitive behaviors. On a separate but related matter, recent press reports have indicated that representatives from the Senate Commerce Committee and the House Transportation and Infrastructure Committee have been meeting with railroads, shipper groups, and labor interests to discuss new compromise legislation that would, among other things, be introduced to remove railroad antitrust immunity and enhance shipper protections. The Senate Judiciary Committee report can be found at: **http://frwebgate.access.gpo.gov/cgi-bin/getdoc.cgi?dbname=111_cong_reports&docid=f:sr009.111.pdf**

Corn and Soybean Inspections Rebound

For the week ending March 26, total grain inspected at major export regions reached 1.84 million metric tons (mmt), up 0.4 percent from the previous week but 6 percent below last year. Inspections of corn (.835 mmt) and soybeans (.601 mmt) rebounded from the past week. Pacific Northwest (.534 mmt) grain inspections, which drove the rise in overall inspections with more grain destined to China and Japan, increased 10 percent from the previous week. Mississippi Gulf (1.10 mmt) grain inspections, however, dropped 2 percent from the previous week.

Possible Record Planted Acreage for 2009 Soybean Crop

USDA's March 30 Prospective Plantings estimates that farmers intend to plant an estimated 76 million acres of soybeans this spring. This would be 306,000 more acres than last year and the largest on record. Kansas, North Carolina, Ohio, North Dakota, Nebraska, Mississippi, Iowa, and Arkansas are expected to each have 100,000 or more acres in soybeans this year. Wheat acres may drop to 58.6 million acres, 93 percent of last year's amount. Kansas, Arkansas, North Dakota, Missouri, Montana, and South Dakota are expected to each have 600,000 to 400,000 less acres of wheat. Intended planting of corn is estimated to be 85 million acres, down 1 percent from last year. Missouri, South Dakota, and Illinois could each have 100,000 or more acres of corn this year. Although these are preliminary intentions, grain shippers could see some impact on transportation services for the soybean crop on a record amount of acres.

Snapshots by Sector

Rail

U.S. railroads originated 18,411 **carloads of grain** during the week ending March 21, down 8 percent from the previous week, 21 percent from the same week last year, and 20 percent lower than the 3-year average.

Ocean

During the week ending March 26, 37 ocean-going **grain vessels** were loaded in the Gulf, down 23 percent from this time last year. Forty-eight **vessels** are expected to be loaded in the U.S. Gulf within the next 10 days, down 26 percent from last year.

Feature Article/Calendar

Wheat Transportation Costs Continue to Decrease Fourth quarter 2008 wheat transportation costs from Kansas and North Dakota to Japan through the Pacific Northwest (PNW) receded to $94.04 and $81.93 per metric ton (mt), down 34 and 36 percent, respectively, from the previous quarter (see table). The cost of shipping from both states to Japan through the U.S. Gulf averaged $81.47and $110.81 per mt, down 50 and 42 percent from the third quarter. The total landed cost (farm value plus transportation costs) for shipping wheat to Japan ranged from $284 to $378 per mt, down 23 to 35 percent from the previous quarter. The drop in total landed costs was driven primarily by lower truck and ocean rates, which decreased 19 and 71 percent. Fourth quarter wheat transportation costs represented 23 to 32 percent of the landed costs, down from the previous quarter (see table).

Quarterly rate comparisons for shipping KS & ND wheat to Japan through the PNW

	KS					ND				
Mode	2007 4th qtr	2008 3rd qtr	2008 4th qtr	Year-to-Year change	Quarterly change	2007 4th qtr	2008 3rd qtr	2008 4th qtr	Year-to-Year change	Quarterly change
	- $/metric ton -				%	- $/metric ton -				%
Truck	10.26	11.86	9.66	-5.85	-18.55	10.26	11.86	9.66	-5.85	-18.55
Rail[1]	59.62	68.44	66.28	11.17	-3.16	49.10	55.52	54.17	10.33	-2.43
Ocean vessel	84.18	61.33	18.10	-78.50	-70.49	84.18	61.33	18.10	-78.50	-70.49
Transportation Costs	154.06	141.63	94.04	-38.96	-33.60	143.54	128.71	81.93	-42.92	-36.35
Farm Value[2]	291.38	273.99	202.95	-30.35	-25.93	292.11	322.00	266.88	-8.64	-17.12
Total Landed Cost	445.44	415.62	296.99	-33.33	-28.54	435.65	450.71	348.81	-19.93	-22.61
Transport % of landed cost	34.59	34.08	31.66			32.95	28.56	23.49		

Quarterly rate comparisons for shipping KS & ND wheat to Japan through the Gulf

	KS					ND				
Mode	2007 4th qtr	2008 3rd qtr	2008 4th qtr	Year-to-Year change	Quarterly change	2007 4th qtr	2008 3rd qtr	2008 4th qtr	Year-to-Year change	Quarterly change
	- $/metric ton -				%	- $/metric ton -				%
Truck	10.26	11.86	9.66	-5.85	-18.55	10.26	11.86	9.66	-5.85	-18.55
Rail[1]	34.12	41.47	41.36	21.22	-0.27	57.51	67.52	70.70	22.94	4.71
Ocean vessel	118.27	110.43	30.45	-74.25	-72.43	118.27	110.43	30.45	-74.25	-72.43
Transportation Costs	162.65	163.76	81.47	-49.91	-50.25	186.04	189.81	110.81	-40.44	-41.62
Farm Value[2]	291.38	273.99	202.95	-30.35	-25.93	292.11	322.00	266.88	-8.64	-17.12
Total Landed Cost	454.03	437.75	284.42	-37.36	-35.03	478.15	511.81	377.69	-21.01	-26.21
Transport % of landed cost	35.82	37.41	28.64			38.91	37.09	29.34		

[1] Rail tariff rates include fuel surchrages.

[2] Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

Ocean rates for wheat shipped from the PNW to Japan decreased 70 percent from the third quarter and nearly 79 percent from year to year (see table). Ocean rates for wheat shipped from the Gulf to Japan decreased 72 percent from the third quarter and 74 percent from last year. Rates from each export region continued to slide due to the global economic downturn. (*see GTR 3-05-09*).

Fourth quarter rail rates from Kansas and North Dakota to the PNW decreased slightly from the previous month. Rail rates declined as high fuel surcharges dropped during the quarter (see figure 7). The rates for moving wheat by rail from Kansas to the Gulf remained relatively stable during the third quarter but increased about 5 percent from North Dakota to the Gulf. From year to year, rail rates from Kansas and North Dakota to the PNW increased 11 and 10 percent (see table). The rates for moving wheat by rail from Kansas and North Dakota to the Gulf increased 21 and 23 percent from year to year due to the surge in fuel surcharges during 2008.

As diesel prices continued to decrease, the cost of moving wheat from each state by truck to a rail-served grain elevator dropped 19 percent from quarter to quarter and 6 percent from year to year.

According to the Foreign Agricultural Service, U.S. calendar year wheat exports to Japan totaled 3.68 million metric tons in 2008, up 9 percent from last year, accounting for 12 percent of total U.S. wheat exports. For the same period, total U.S. wheat exports reached 30.07 million metric tons, down 9 percent from the past year. For the 2008/09 marketing year, year to date export sales (shipped) of all major class of wheat are down from the previous year (*See GTR, Table 12*). Johnny.Hill@usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail[2]	Barge	Ocean	
Week ending				Gulf	Pacific
04/01/09	149	74	138	179	142
03/25/09	140	74	151	179	142

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

[2]The rail indicator is not an index. It is the difference between the nearby secondary rail market bid for this week and the average bid for year 2000 (+) 100.

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	3/27/2009	3/20/2009
Corn	IL--Gulf	-0.58	-0.57
Corn	NE--Gulf	-0.63	-0.57
Soybean	IA--Gulf	-1.08	-1.17
HRW	KS--Gulf	-1.17	-1.22
HRS	ND--Portland	n/a	-1.45

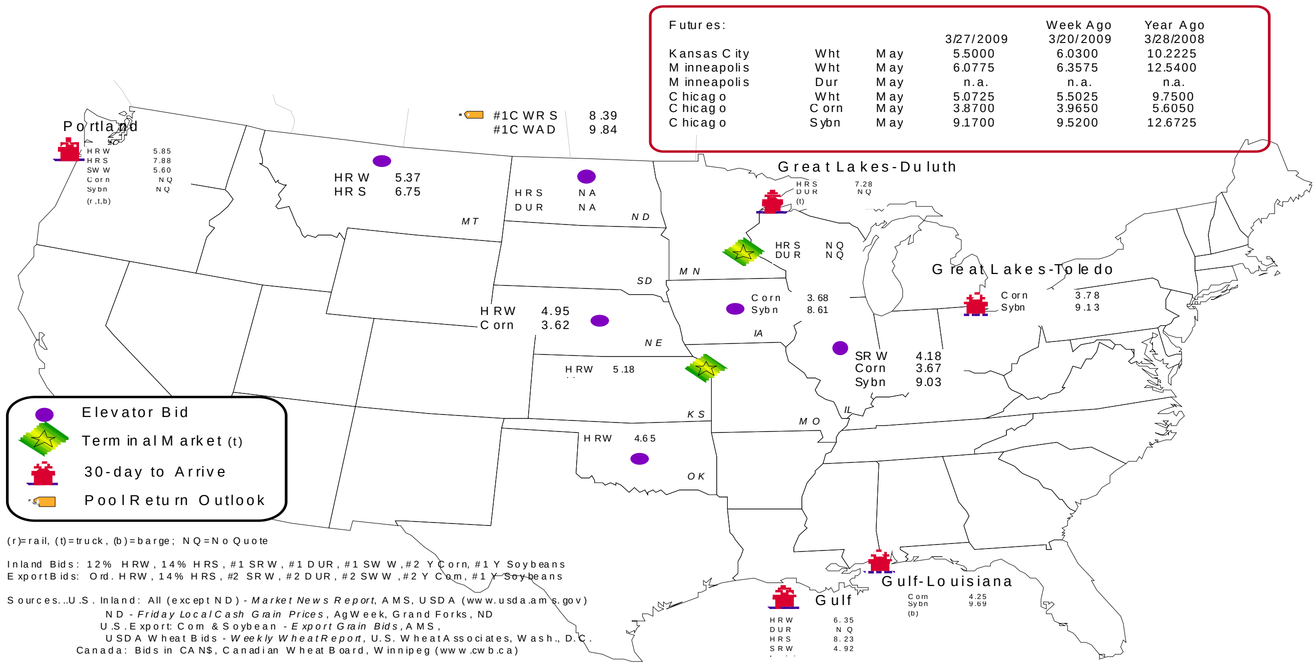
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)[1]

Week ending	Mississippi Gulf [2]	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
3/25/2009[p]	125	685	850	4,022	728	6,410
3/18/2009[r]	269	1,095	538	3,028	485	5,415
2009 YTD	10,791	12,092	10,000	41,129	7,803	81,815
2008 YTD	18,386	31,803	6,552	64,597	13,347	134,685
2009 YTD as % of 2008 YTD	59	38	153	64	58	61
Last 4 weeks as % of 20078[3]	42	41	183	58	56	57
Last 4 weeks as % of 4-year avg.[3]	42	50	85	72	107	66
Total 2008	68,768	107,542	37,728	255,852	33,028	502,918
Total 2007	62,169	113,730	40,725	227,970	31,369	475,963

[1] Data is incomplete as it is voluntarily provided; [2] Mississippi Gulf data back to January, 2004 from several new sources has been added resulting in large increases in the numbers reported; [3] Compared with same 4-weeks in 2007 and prior 4-year average.

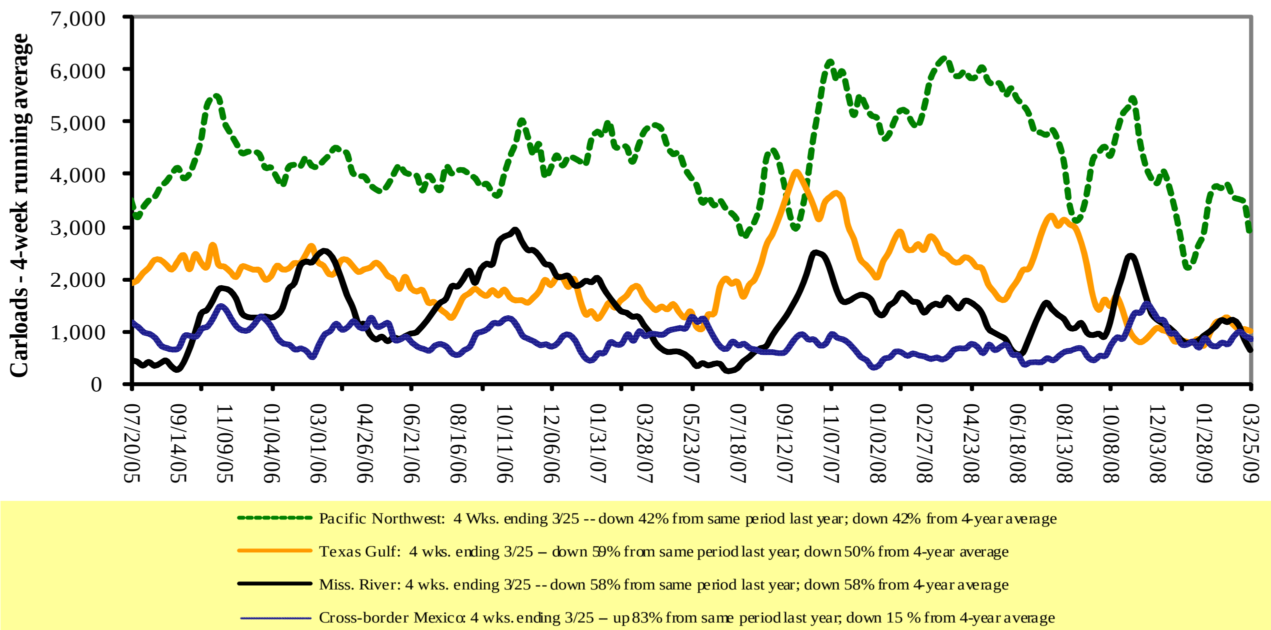
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 35 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

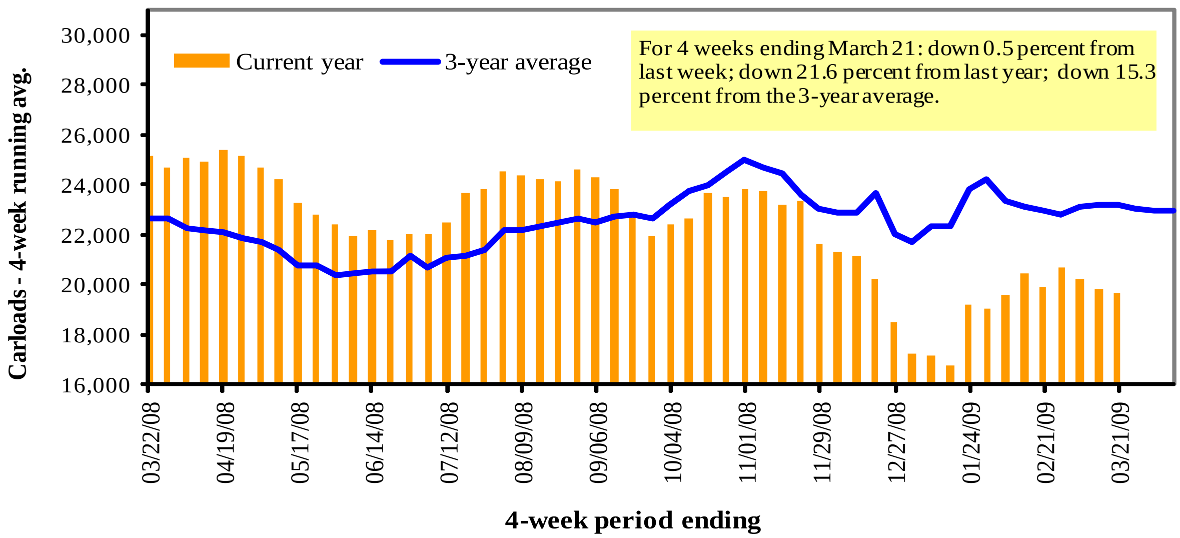
	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
03/21/09	2,204	2,122	9,050	645	4,390	18,411	4,517	6,277
This week last year	2,532	3,007	12,356	656	6,856	25,407	4,433	4,057
2009 YTD	26,066	28,150	101,869	7,861	54,018	217,964	48,110	59,623
2008 YTD	33,166	33,453	130,107	7,924	74,391	279,041	48,933	47,779
2009 YTD as % of 2008 YTD	79	84	78	99	73	78	98	125
Last 4 weeks as % of 2008[1]	88	80	77	101	70	77	110	148
Last 4 weeks as % of 3-yr avg.[1]	81	79	89	106	80	85	101	138
Total 2008	136,143	162,177	573,285	37,822	323,104	1,232,531	226,849	220,714

[1]As a percent of the same period in 2008 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3

Total Weekly U.S. Class I Railroad Grain Car Loadings



Source: Association of American Railroads

Table 5

Rail Car Auction Offerings[1] ($/car)[2]

Week ending	Delivery period							
3/28/2009	Apr-09	Apr-08	May-09	May-08	Jun-09	Jun-08	Jul-09	Jul-08
BNSF[3]								
COT grain units	no bids	0	0	0	0	0	no bids	n/a
COT grain single-car[5]	no offer	2 . . 20	no bids	0 . . 1	no bids	0 . . 6	no bids	n/a
UP[4]								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no offer	no offer	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no offer	no offer	n/a

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction

[3]BNSF - COT = Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[5]Range is shown because average is not available. Not available = n/a.

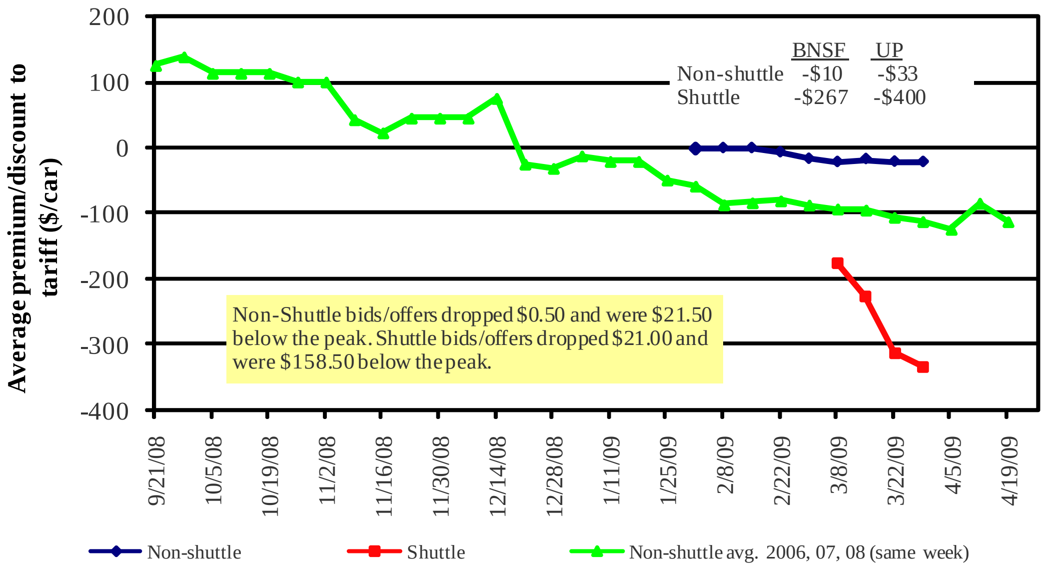
Source: Transportation & Marketing Programs/AMS/USDA.

Rail service may be ordered directly from the railroad via **auction** for guaranteed service, or via tariff for nonguaranteed service, or through the secondary railcar market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Bids/Offers for Railcars to be Delivered in April 2009, Secondary Market

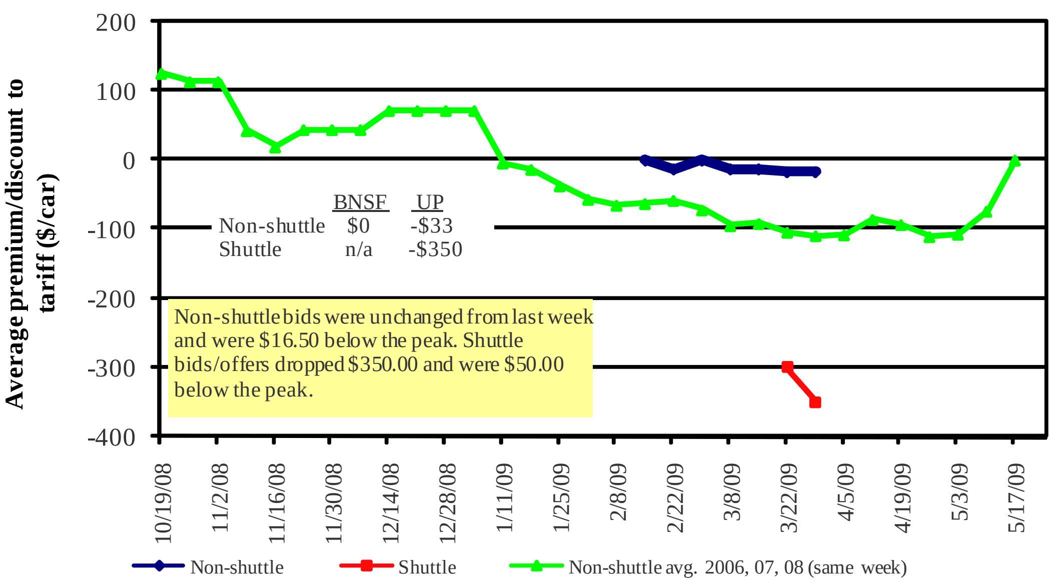


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in May 2009, Secondary Market

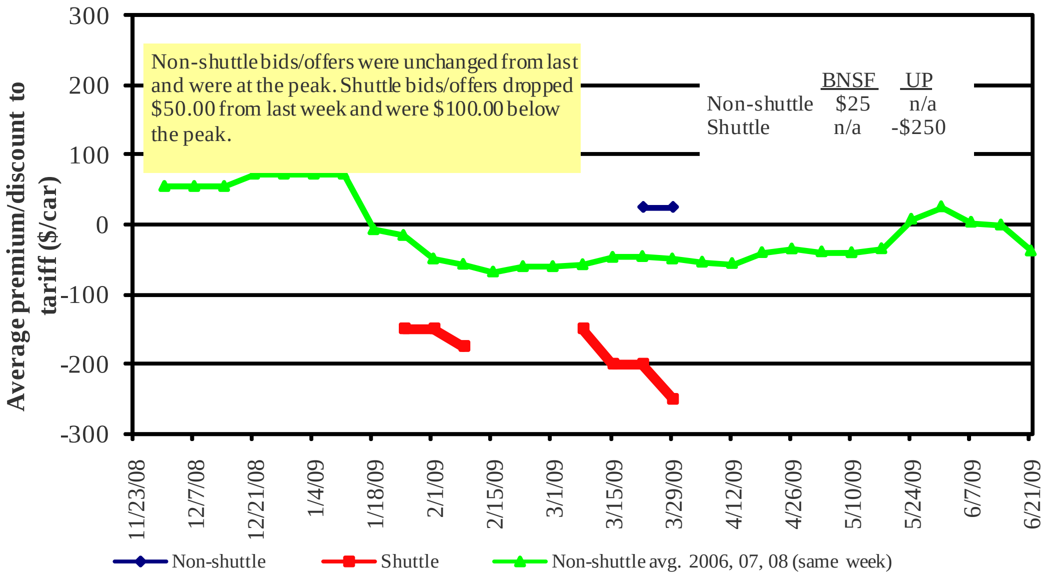


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in June 2009, Secondary Market



Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Rail Car Market ($/car)[1]

Week ending 3/28/2009	**Delivery period** Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sep-09
Non-shuttle						
BNSF-GF	-10	0	25	25	n/a	n/a
Change from last week	-6	0	0	0	n/a	n/a
Change from same week 2008	-5	8	38	n/a	n/a	n/a
UP-Pool	-33	-33	n/a	n/a	n/a	n/a
Change from last week	5	0	n/a	n/a	n/a	n/a
Change from same week 2008	49	84	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	-267	n/a	n/a	n/a	n/a	n/a
Change from last week	58	n/a	n/a	n/a	n/a	n/a
Change from same week 2008	-79	n/a	n/a	n/a	n/a	n/a
UP-Pool	-400	-350	-250	n/a	n/a	n/a
Change from last week	-100	-50	-50	n/a	n/a	n/a
Change from same week 2008	n/a	n/a	-75	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week

[2]Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments[1]

Effective date:			Tariff	Fuel surcharge	Tariff plus surcharge per:		Percent change
3/9/2009	Origin region	Destination region	rate/car	per car	metric ton	bushel[2]	Y/Y[3]
Unit train[1]							
Wheat	Chicago, IL	Albany, NY	$2,522	$2	$27.82	$0.76	0
	Kansas City, MO	Galveston, TX	$2,528	$0	$27.87	$0.76	-1
	South Central, KS	Galveston, TX	$3,395	$190	$39.51	$1.08	11
	Minneapolis, MN	Houston, TX	$3,539	$384	$43.24	$1.18	-1
	St. Louis, MO	Houston, TX	$3,305	$0	$36.43	$0.99	11
	South Central, ND	Houston, TX	$5,268	$427	$62.77	$1.71	11
	Minneapolis, MN	Portland, OR	$3,940	$467	$48.57	$1.32	-7
	South Central, ND	Portland, OR	$3,940	$383	$47.65	$1.30	-6
	Northwest, KS	Portland, OR	$4,840	$510	$58.98	$1.61	-3
	Chicago, IL	Richmond, VA	$2,557	$70	$28.96	$0.79	-1
Corn	Chicago, IL	Baton Rouge, LA	$3,128	$0	$34.48	$0.88	-11
	Council Bluffs, IA	Baton Rouge, LA	$3,223	$0	$35.53	$0.90	-5
	Kansas City, MO	Dalhart, TX	$3,284	$138	$37.72	$0.96	-1
	Minneapolis, MN	Portland, OR	$3,430	$467	$42.95	$1.09	-8
	Evansville, IN	Raleigh, NC	$3,008	$68	$33.91	$0.86	3
	Columbus, OH	Raleigh, NC	$2,897	$60	$32.59	$0.83	4
	Council Bluffs, IA	Stockton, CA	$5,390	$504	$64.97	$1.65	-6
Soybeans	Chicago, IL	Baton Rouge, LA	$3,178	$0	$35.03	$0.95	-11
	Council Bluffs, IA	Baton Rouge, LA	$3,192	$0	$35.19	$0.96	-7
	Minneapolis, MN	Portland, OR	$4,360	$467	$53.20	$1.45	-5
	Evansville, IN	Raleigh, NC	$3,008	$68	$33.91	$0.92	3
	Chicago, IL	Raleigh, NC	$3,608	$85	$40.71	$1.11	1
Shuttle Train							
Wheat	St. Louis, MO	Houston, TX	$2,642	$0	$29.12	$0.79	7
	Minneapolis, MN	Portland, OR	$3,540	$467	$44.16	$1.20	-10
Corn	Fremont, NE	Houston, TX	$2,520	$282	$30.89	$0.78	-6
	Minneapolis, MN	Portland, OR	$3,348	$467	$42.05	$1.07	-10
Soybeans	Council Bluffs, IA	Houston, TX	$2,787	$274	$33.74	$0.92	-2
	Minneapolis, MN	Portland, OR	$3,502	$467	$43.75	$1.19	-10

[1]A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

[2]Approximate load per car = 100 short tons (90.72 metric tons): corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

[3]Percentage change year over year calculated using tariff rate plus fuel surchage

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Table 8

Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico

Effective date: 3/9/2009				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change
Commodity	state	Destination region	rate/car[1]	per car	metric ton	bushel[2]	Y/Y[3]
Wheat	MT	Chihuahua, CI	$5,896	$434	$64.68	$1.76	-3
	OK	Cuautitlan, EM	$5,360	$264	$57.46	$1.56	0
	KS	Guadalajara, JA	$5,830	$255	$62.17	$1.69	-2
	TX	Salinas Victoria, NL	$2,984	$66	$31.17	$0.85	2
Corn	IA	Guadalajara, JA	$6,395	$300	$68.40	$1.74	-11
	SD	Penjamo, GJ	$6,300	$568	$70.18	$1.78	-11
	NE	Queretaro, QA	$6,167	$177	$64.82	$1.64	-5
	SD	Salinas Victoria, NL	$4,740	$432	$52.84	$1.34	-4
	MO	Tlalnepantla, EM	$5,364	$172	$56.57	$1.44	-9
	SD	Torreon, CU	$5,310	$476	$59.12	$1.50	-10
Soybeans	MO	Bojay (Tula), HG	$5,819	$253	$62.04	$1.69	-11
	NE	Guadalajara, JA	$6,200	$289	$66.30	$1.80	-12
	IA	Penjamo (Celaya), GJ	$6,050	$565	$67.59	$1.84	-12
	KS	Torreon, CU	$5,040	$179	$53.33	$1.45	-10
Sorghum	OK	Cuautitlan, EM	$4,309	$431	$48.43	$1.23	-5
	TX	Guadalajara, JA	$4,800	$370	$52.82	$1.34	-5
	NE	Penjamo, GJ	$6,225	$258	$66.24	$1.68	-7
	KS	Queretaro, QA	$5,468	$162	$57.52	$1.46	-3
	NE	Salinas Victoria, NL	$4,377	$190	$46.66	$1.18	-4
	NE	Torreon, CU	$5,130	$212	$54.58	$1.39	-8

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

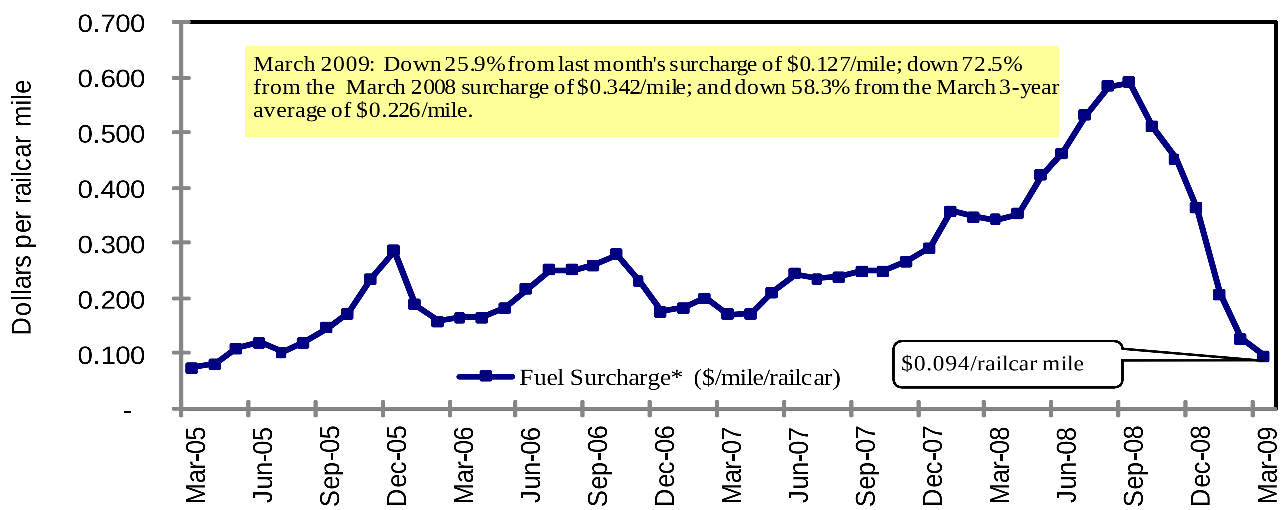
[2]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[3]Percentage change year over year calculated using tariff rate plus fuel surchage

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

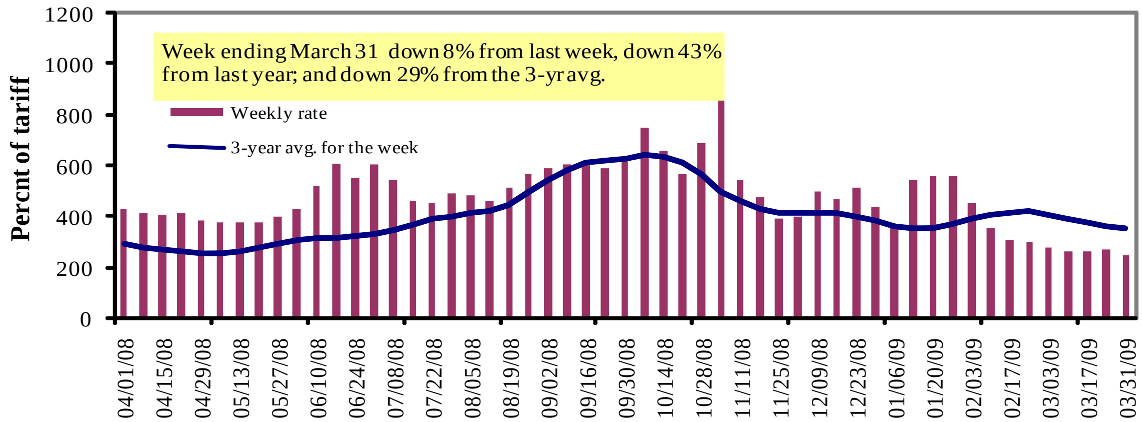
* Mileage-based fuel surcharges from December 2004 through March 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

Sources: www.bnsf.com, www.cn.ca, www8.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	3/31/2009	320	275	249	203	208	208	188
	3/24/2009	337	308	271	228	213	213	196
$/ton	3/31/2009	19.81	14.63	11.54	8.08	9.77	8.42	5.91
	3/24/2009	20.84	16.39	12.57	9.10	9.97	8.59	6.16
Current week % change from the same week:								
	Last year	-	-48	-43	-43	-50	-50	-41
	3-year avg. [2]	89	-19	-29	-28	-31	-31	-24
Rate[1]	April	318	273	259	212	210	210	192
	June	325	284	280	237	237	237	222

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds.

Source: Transportation & Marketing Programs/AMS/USDA

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 9).

Figure 9

Benchmark tariff rates

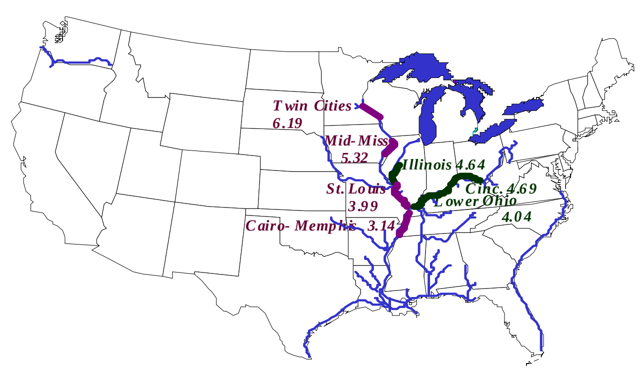
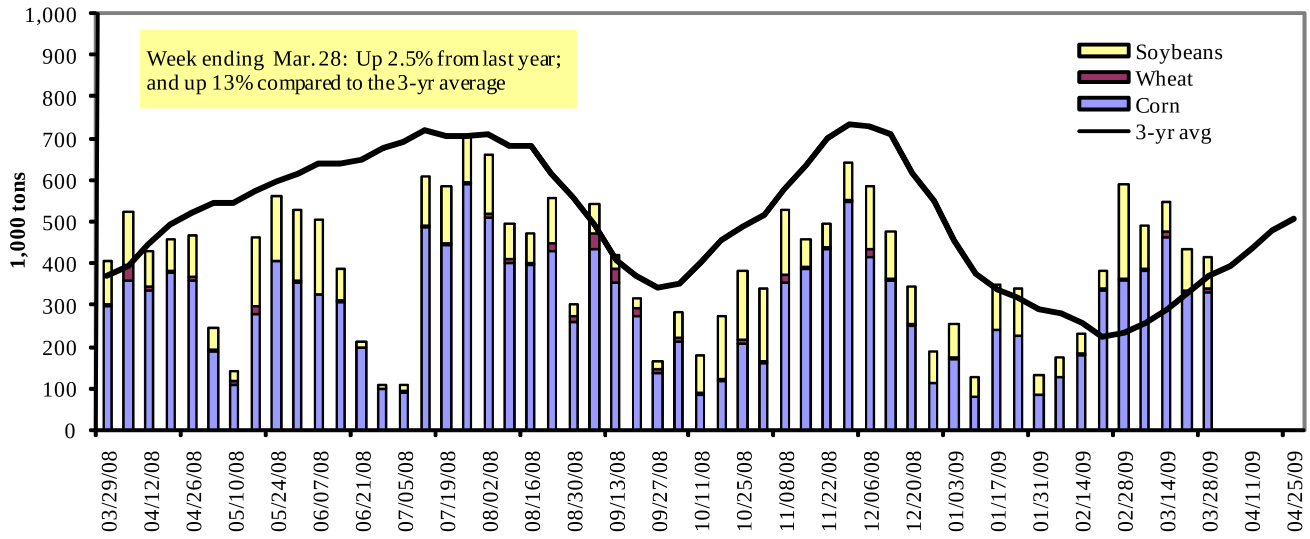


Figure 10

Barge Movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



[1] The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 3/28/2009	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	46	2	55	0	103
Winfield, MO (L25)	119	2	56	0	177
Alton, IL (L26)	331	9	90	0	430
Granite City, IL (L27)	329	12	77	2	420
Illinois River (L8)	180	8	28	0	216
Ohio River (L52)	76	8	49	7	140
Arkansas River (L1)	0	6	24	4	33
Weekly total - 2009	405	26	149	13	593
Weekly total - 2008	389	6	116	6	518
2009 YTD[1]	4,724	242	2,325	76	7,367
2008 YTD	4,587	181	1,846	170	6,784
2009 as % of 2008 YTD	103	133	126	45	109
Last 4 weeks as % of 2008[2]	127	336	116	73	127
Total 2008	18,783	1,542	7,062	453	27,840

[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, a

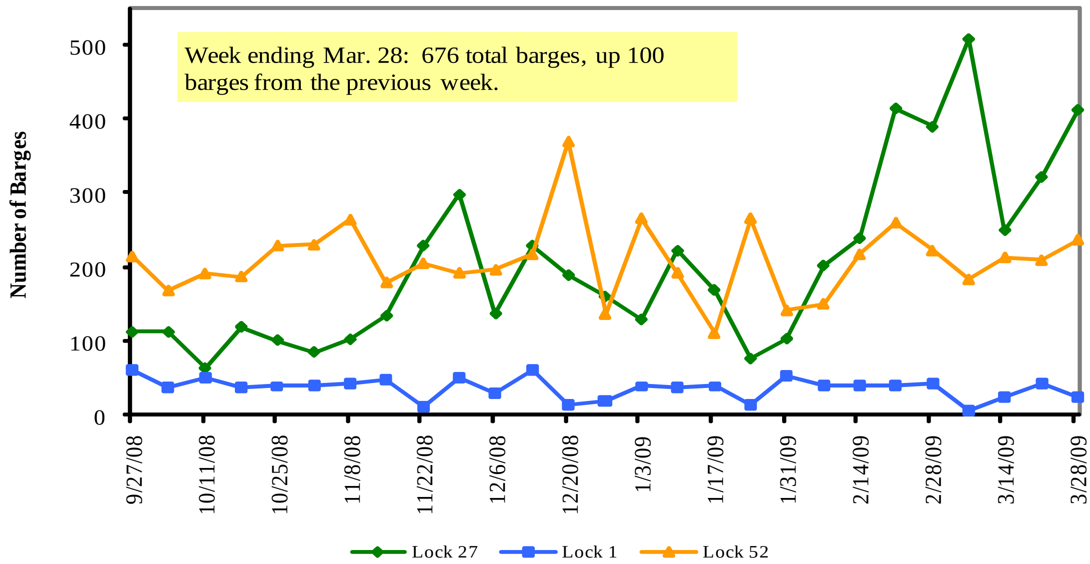
[2] As a percent of same period in 2008.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Figure 11

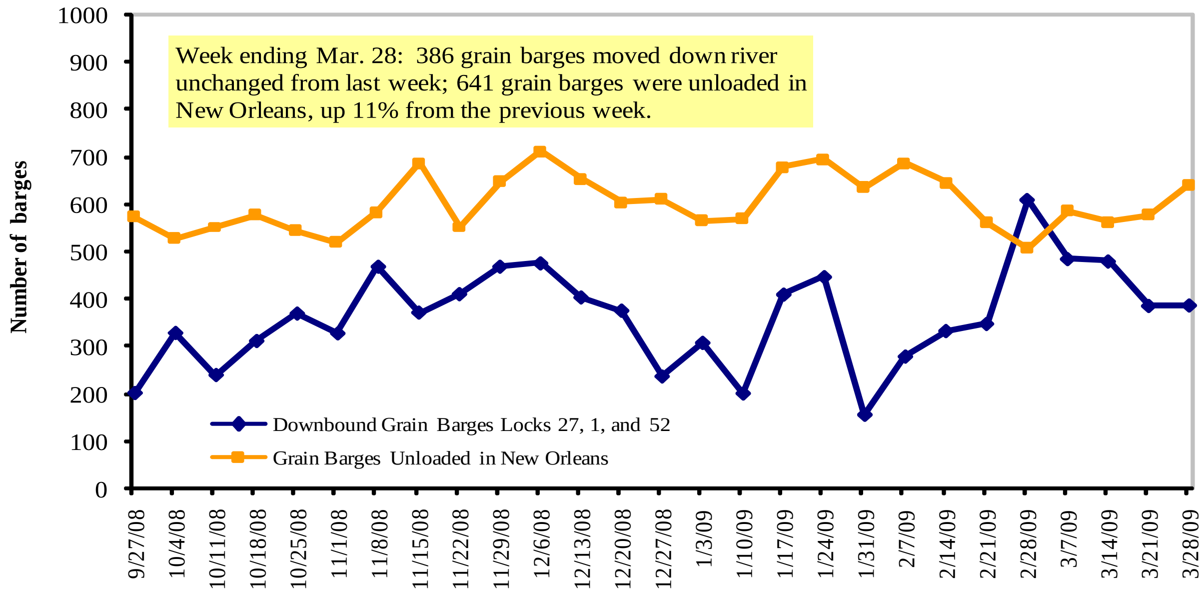
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



Source: U.S. Army Corps of Engineers and GIPSA

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 3/30/2009 (US$/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.281	0.115	-1.733
	New England	2.424	0.381	-1.706
	Central Atlantic	2.399	0.084	-1.761
	Lower Atlantic	2.218	0.137	-1.723
II	Midwest[2]	2.176	0.138	-1.753
III	Gulf Coast[3]	2.203	0.143	-1.704
IV	Rocky Mountain	2.146	0.110	-1.826
V	West Coast	2.282	0.132	-1.767
	California	2.297	0.168	-1.815
Total	U.S.	2.221	0.131	-1.743

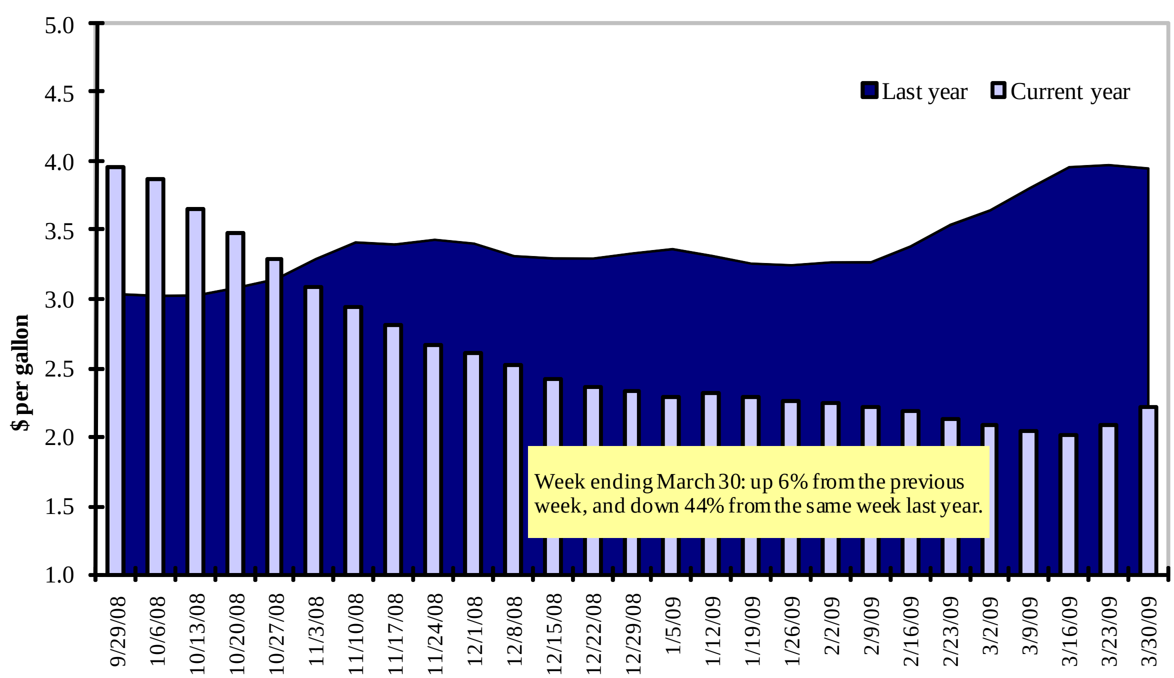
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

Grain Exports

Table 12

U.S. Export Balances and Cumulative Exports (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
3/19/2009	1,091	556	930	673	79	3,329	9,400	4,105	16,834
This week year ago	2,704	761	1,200	696	53	5,414	16,312	4,924	26,650
Cumulative exports-marketing year[2]									
2008/09 YTD	9,968	4,458	4,381	2,622	362	21,790	22,316	24,393	68,499
2007/08 YTD	11,126	4,795	6,760	3,566	980	27,228	36,511	21,988	85,727
YTD 2008/09 as % of 2007/08	90	93	65	74	37	80	61	111	80
Last 4 wks as % of same period 2007/08	44	91	78	109	136	67	57	90	65
2007/08 Total	13,709	5,568	7,842	4,191	1,075	32,385	59,666	30,411	122,462
2006/07 Total	6,800	3,866	6,480	4,996	761	22,902	53,799	30,261	106,962

[1] Current unshipped export sales to date

[2] Shipped export sales to date; new marketing year now in effect for corn and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

Top 5 Importers[1] of U.S. Corn

Week ending 03/19/09	**Total Commitments**[2]		**% change**	**Exports**[3]
	2008/09	**2007/08**	**current MY**	
	Current MY	**Last MY**	**from last MY**	**2007/08**
	- 1,000 mt -			**- 1,000 mt -**
Japan	10,764	12,499	(14)	15,294
Mexico	5,668	7,505	(24)	8,767
Korea[4]	3,442	8,104	(58)	8,621
Taiwan	2,325	3,207	(28)	3,476
Egypt	1,237	2,951	(58)	3,309
Top 5 importers	**23,435**	**34,266**	**(32)**	**39,467**
Total US corn export sales	**31,716**	**52,823**	**(40)**	**61,870**
% of Projected	73%	85%		
Change from Last Week	1,191	633		
Top 5 importers' share of U.S. corn export sales	74%	65%		
USDA forecast, March 2009	**43,180**	**61,870**	**(30)**	
Corn Use for Ethanol USDA forecast, March 2009	**93,980**	**76,861**	**22**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3]FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

[4] Not included - FAS Press Release: **220,000 mt** (110,000 mt on 03/23 and 110,000 mt on 03/27) to Korea for

Table 14

Top 5 Importers[1] of U.S. Soybeans

Week ending 03/19/09	Total Commitments[2] 2008/09 Current MY	2007/08 Last MY	% change current MY from last MY	Exports[3] 2007/08
	- 1,000 mt -			- 1,000 mt -
China	16,643	11,850	40	13,354
Mexico	2,078	3,007	(31)	3,575
Japan	2,091	2,343	(11)	2,710
EU-25	2,173	3,640	(40)	3,896
Taiwan	1,222	1,365	(10)	1,728
Top 5 importers	**24,207**	**22,205**	**9**	**25,262**
Total US soybean export sales	**28,498**	**26,912**	**6**	
% of Projected	88%	85%		
Change from last week	429	370		
Top 5 importers' share of U.S. soybean export sales	85%	83%		
USDA forecast, March 2009	**32,250**	**31,600**	**2**	
Soybean Use for Biodiesel USDA forecast, March 2009	**5,275**	**7,148**	**(26)**	

(n) indicates negative number.

[1]Based on FAS 2006/07 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

[2] Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 15

Top 10 Importers[1] of All U.S. Wheat

Week ending 03/19/09	Total Commitments[2] 2008/09 Current MY	2007/08 Last MY	% change current MY from last MY	Exports[3] 2007/08
	- 1,000 mt -			- 1,000 mt -
Japan	2,950	3,340	(12)	3,319
Egypt	1,923	2,986	(36)	3,276
Nigeria	2,463	2,384	3	2,597
Mexico	2,435	2,589	(6)	2,568
Iraq	1,205	2,312	(48)	1,964
Phililppines	1,433	1,671	(14)	1,538
Korea, South	1,135	1,587	(28)	1,509
Indonesia	613	973	(37)	1,093
Taiwan	617	1,059	(42)	1,068
Venezuela	521	944	(45)	997
Top 10 importers	**15,295**	**19,845**	**(23)**	**19,930**
Total US wheat export sales	**25,119**	**32,642**	**(23)**	**34,400**
% of Projected	94%	95%		
Change from last week	264	380		
Top 10 importers' share of U.S. wheat export sales	61%	61%		
USDA forecast, March 2009	**26,670**	**34,400**	**(22)**	

(n) indicates negative number.

[1]Based on FAS 2007/08 Marketing Year Ranking Reports (except Algeria) - www.fas.usda.gov; Marketing year = Jun 1 - May 31.

[2] Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port regions	Week ending 03/26/09	2009 YTD[1]	2008 YTD[1]	2009 YTD as % of 2008 YTD	Last 4-weeks as % of 2008	Last 4-weeks as % of 3-yr. avg.	Total[1] 2008
Pacific Northwest							
Wheat	121	2,181	3,240	67	78	88	10,508
Corn	155	1,517	2,841	53	46	63	12,641
Soybeans	258	2,547	3,016	84	103	108	9,478
Total	**534**	**6,245**	**9,097**	**69**	**72**	**85**	**32,626**
Mississippi Gulf							
Wheat	138	1,053	1,083	97	141	132	6,321
Corn	632	6,537	9,387	70	91	94	28,497
Soybeans	334	6,476	5,680	114	84	99	16,295
Total	**1,103**	**14,066**	**16,150**	**87**	**93**	**99**	**51,113**
Texas Gulf							
Wheat	145	1,246	1,752	71	92	104	9,852
Corn	44	407	824	49	68	66	1,516
Soybeans	7	472	92	513	113	257	178
Total	**196**	**2,124**	**2,668**	**80**	**87**	**98**	**11,545**
Great Lakes							
Wheat	0	0	25	2	3	2	831
Corn	0	0	12	0	n/a	0	294
Soybeans	0	0	6	0	0	0	315
Total	**0**	**0**	**43**	**1**	**2**	**2**	**1,439**
Atlantic							
Wheat	1	84	175	48	2	3	891
Corn	4	26	378	7	6	13	576
Soybeans	2	278	242	115	43	34	605
Total	**8**	**389**	**795**	**49**	**9**	**12**	**2,073**
U.S. total from ports[2]							
Wheat	405	4,564	6,250	73	89	97	28,402
Corn	835	8,487	13,442	63	76	84	43,523
Soybeans	601	9,773	9,036	108	90	103	26,871
Total	**1,842**	**22,824**	**28,728**	**79**	**83**	**92**	**98,796**

[1] Includes weekly revisions, some regional totals may not add exactly due to rounding.

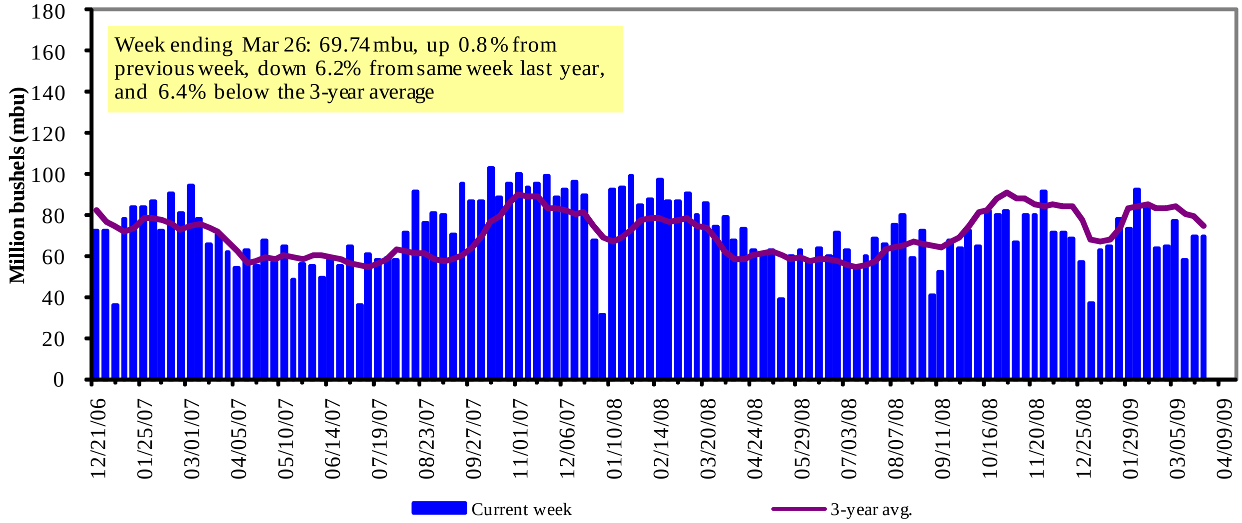
[2] Total includes only port regions shown above

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 57 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2008.

Figure 14

U.S. grain inspected for export (wheat, corn, and soybeans)

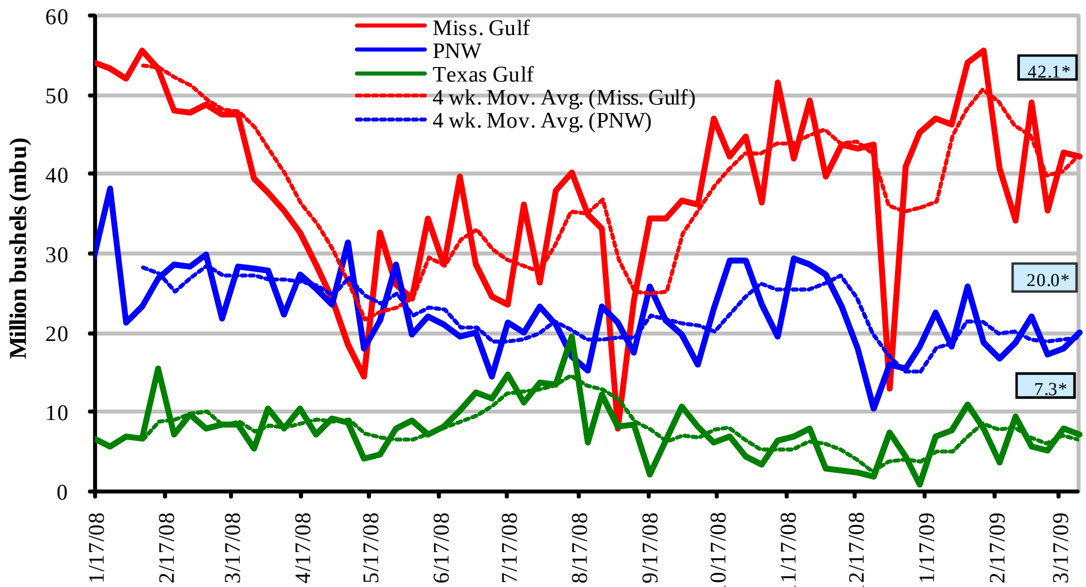


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

Note: 3-year average consists of 4-week running average

Figure 15

Weekly U.S. Grain Inspections: U.S. Gulf and PNW (wheat, corn, and soybeans)



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); *mbu, this week.

Mar 26: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 1.5	down 9	down 3	up 10
Last year (same week)	up 7	up 36	up 11	down 29
3-yr avg. (4-wk mov. avg.)	down 2	up 8	down 1	down 13

Ocean Transportation

Table 17

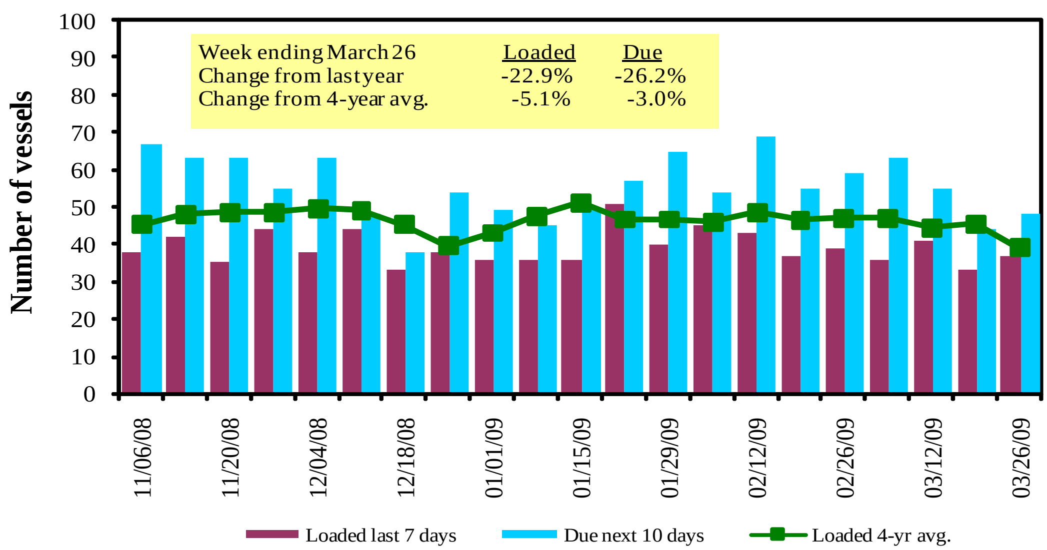
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
3/26/2009	27	37	48	14	10
3/19/2009	45	33	44	11	8
2008 range	(15..55)	(27..61)	(39..87)	(2..16)	(0..15)
2008 avg.	35	42	61	10	7

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf[1] Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan

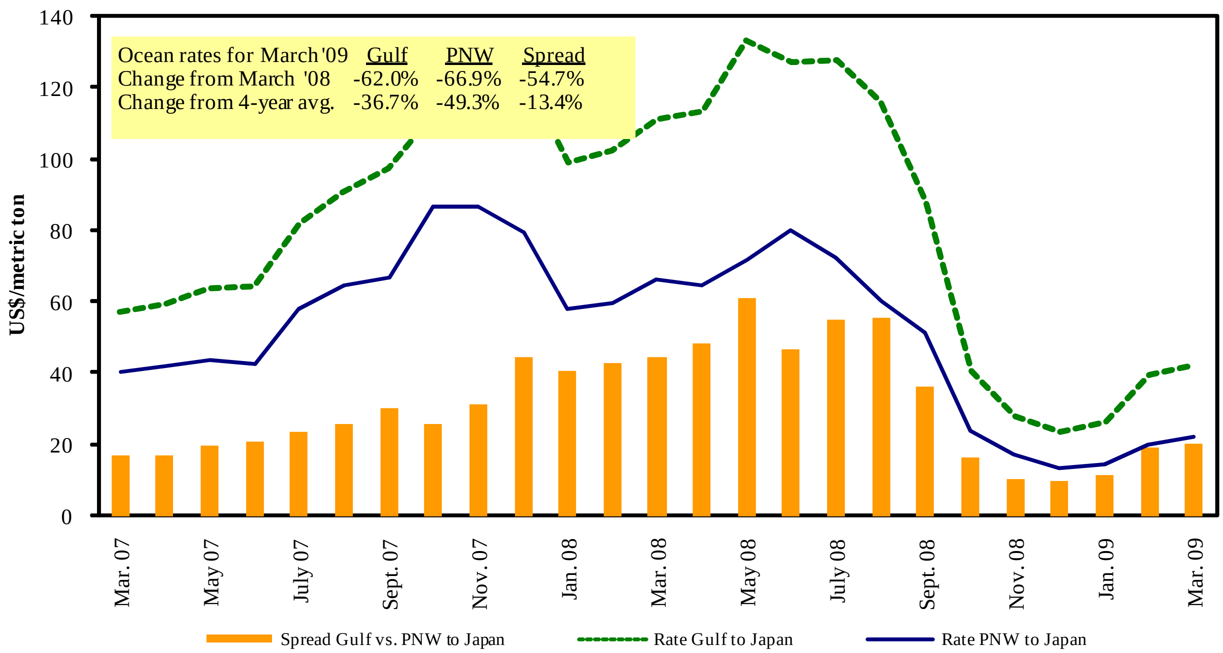


Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 3/28/2009

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Hvy Grain	Feb 1/10	55,000	23.75
U.S. Gulf	China	Hvy Grain	Jan 5/15	55,000	21.00
U.S. Gulf	China	Hvy Grain	Jan 1/5	55,000	21.00
U.S. Gulf	China	Hvy Grain	Jan 1/5	55,000	21.00
U.S. Gulf	Russia	Hvy Grain	Feb 25/Mar 5	25,000	30.50
U.S. Gulf	Haiti[1]	Wheat	Apr 17/20	7,100	68.95
U.S. Gulf	Egypt Mediterranean	Hvy Grain	Jan 14/18	60,000	12.15
Brazil	China	Grain	Mar 20/30	80,000	32.50
Brazil	Morocco	Maize	Feb 3/8	22,500	22.50
Brazil	Greece	Soybeans	Feb 18/16	24,000	24.00
France	Algeria	Wheat	Mar 5/10	25,000	27.00
River Plate	Algeria	Maize	Apr 5/10	30,000	30.00
River Plate	China	Hvy Grain	Mar	60,000	32.50
River Plate	China	Hvy Grain	Apr	60,000	32.50
River Plate	Libya	Soybean meal	Mar 1/14	15,000	51.00
River Plate	Morocco	Maize	Feb 1/5	25,000	35.50
River Plate	Poland	Meals	Apr 1/5	30,000	36.00
Uruguay	Libya	Maize	Feb 25/28	20,000	27.00

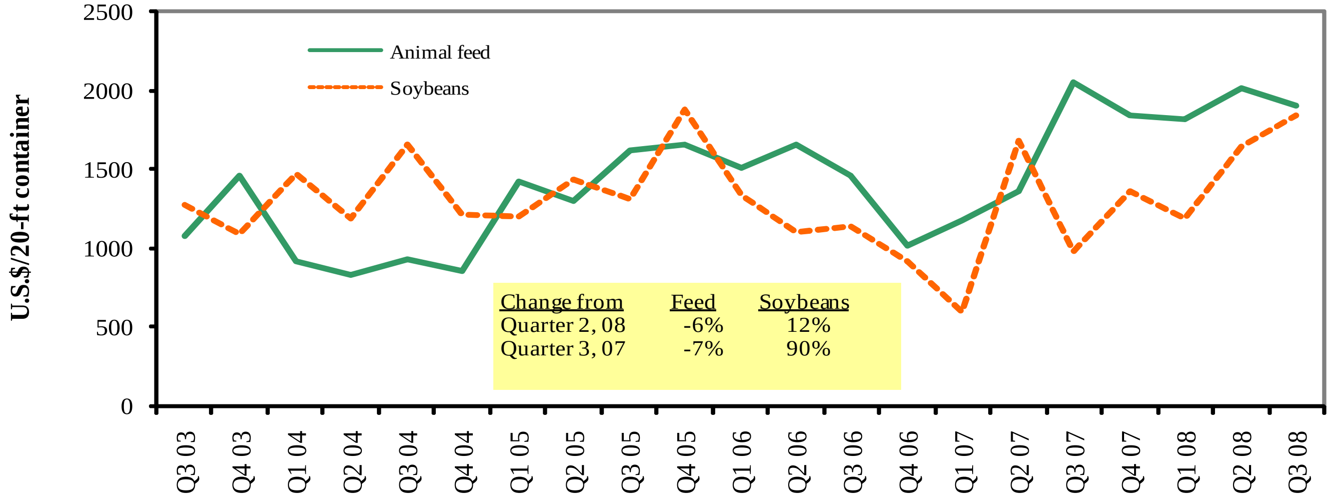
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

[1]75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Source: Maritime Research Inc. (www.maritime-research.com)

Figure 18

Ocean Rates[1] for Containerized Shipments to Selected Asian Countries



[1]Rates are weighted by shipping line market share and destination country. Rates provided are publicly filed tariff rates, not those negotiated in a confidential service contract.

Countries include: Animal Feed: Bangkok-Thailand (3%), Busan-Korea (25%), Hong Kong (9%), Kaohsiung/Keelung-Taiwan (55%), Tokyo-Japan (8%). Soybeans: Kaohsiung/Keelung-Taiwan (97%), Tokyo-Japan (2%)

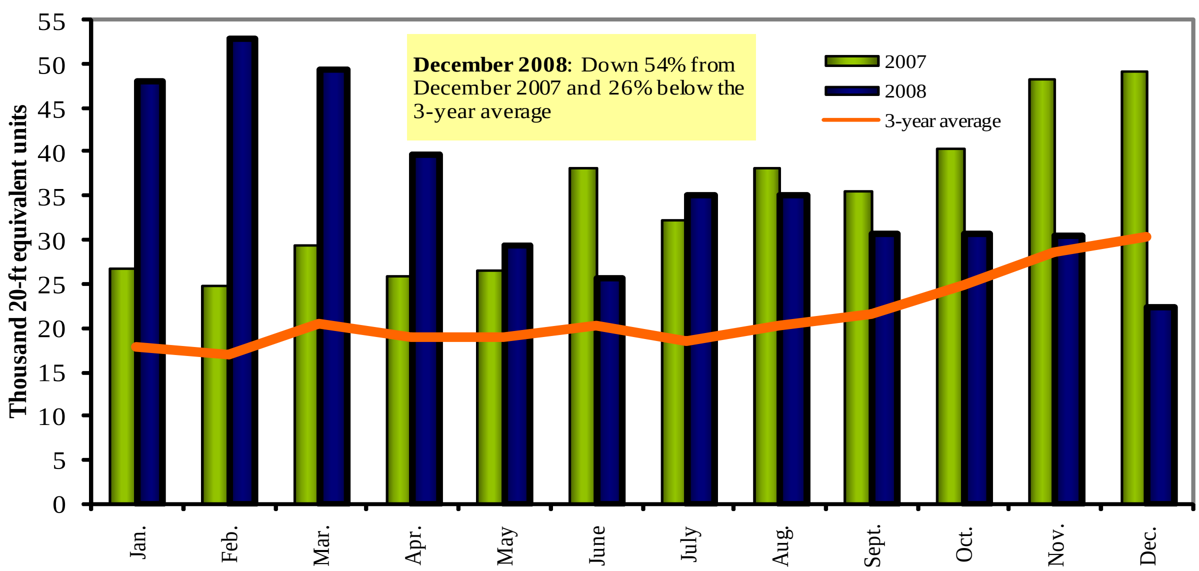
Source: Ocean Rate Bulletin, Quarter 3, 2008, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

During 2007, containers were used to transport 5 percent of total U.S. waterborne grain exports, and 9 percent of U.S. grain exports to Asia.

Figure 19

Monthly Shipments of Containerized Grain to Asia



Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

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Ocean Rate Bulletin